

CITY OF ATLANTA
INVITATION TO PROPOSE

Sealed Proposals for **FC6004007863, CUSTOMER INFORMATION SYSTEM (“CIS”)/BILLING SYSTEM AND OFF-SITE BILLING SERVICES**, should be received by designated staff of the Department of Procurement, 55 Trinity Avenue, S.W., City Hall South, Suite 1790, Atlanta, Georgia 30303, by 1:59 p.m. on **December 1, 2004**.

At 2:00 p.m. the Proposals will be publicly opened and the names of submitting Proponents read at the Department of Procurement Bid Conference Room, 55 Trinity Avenue, S.W., City Hall South, Suite 1900, Atlanta, Georgia 30303.

Project Background:

The City of Atlanta (COA) or (“City”) Department of Watershed Management (DWM) is replacing its current Billing System (this scope of implementation services for the CIS is included within the RFP Specification Section 17100) for the purpose of expanding and integrating services across several departments. This billing system must integrate to existing legacy systems, such as:

- MARSG – current financial management system
- Maximo – current Water Bureau work order system
- Hansen – current Wastewater work order system
- BMI – current backflow and cross connection tracking system
- ArcView – current GIS
- Itron - current meter reading (with modification for future AMR)

This new billing system must also integrate to the proposed Oracle CRM, to be implemented under this scope of work (this scope of Integration Services for the CRM is included within Specification Section 17150). Required features of the billing system are identified in following sections of this Proposal and represent the minimum requirements for each area:

- a) Customer Service
- b) Meters Readings
- c) Work Order Management
- d) Billing
- e) History
- f) Payments
- g) Reporting
- h) Billing Features and Functionality

As a minimum, the new system must provide the same functions listed for the existing Customer Star II (CSTAR) billing system and allow automation for each of the functions and reports listed within these specifications.

Scope of Work: The City is seeking qualified and experienced Proponents to propose to provide:

- A new Customer Information System (see RFP Specification Section 17100)
- Implementation services of Oracle CRM as it relates to DWM Billing (see RFP Specification Section 17150)
- Any additional/upgraded network, communication, hardware and software required to implement the new Customer Information System
- Implementation services, including product installation, historical and current data conversion, documentation, testing, training and cut-over
- Consulting services in the selection and implementation of an off-site billing service, integrated to the selected CIS System
- System training, continuous accessibility and periodic, onsite availability for support and maintenance

Proposal Process

A non-mandatory Pre-Proposal Conference will be held on **November 16th, 2004**, at **9:00 a.m.**, 55 Trinity Avenue, S.W., City Hall South, Suite 1900, Atlanta, Georgia 30303. Representatives from the City including the Department of Procurement, Department of Finance, Office of Contract Compliance, Risk Management, and the Department of Watershed Management will be available for discussion at this meeting. Potential Proponents that intend to submit proposals on the project are urged to attend the Pre-Proposal Conference.

Proposal Process Sequence:

| Activity | Cumulative Duration from Start |
|--|---------------------------------------|
| Pre-RFP Conference | 2 weeks |
| RFP Questions deadline | 3 weeks |
| Proposals Due | 4 weeks |
| Proposal Evaluations Complete | 6 weeks |
| Selected Proponent Notified of Interview | 6 weeks |
| Interviews | 8 weeks |
| Site Visit | 10 weeks |
| Interview Evaluations complete | 12 weeks |
| Proponent selected | 14 weeks |
| Contract negotiations complete | 16 weeks |

Proposal Sequence includes:

- Pre-Proposal Conference– This conference is for Proponents to ask questions and be informed of the schedule and content requirements for the proposal and interviews.
- Proposal Questions deadline – This is the date (November 24th, 2004), after which, no additional questions will be accepted. All questions provided in writing (via U.S. Mail or e-mail) to the City Department of Procurement will be answered by way of an addendum.
- Proposal Due Date – Proposals are due on this date (December 1st, 2004, @ 1:59 p.m.), timed in accordance with the published requirements. All proposals shall be received at the time and place indicated in this document. Those Proposals not submitted in strict accordance with these requirements will not be considered. This proposal submittal shall be prepared and submitted in a dual envelope system; one envelope containing the proposal, the second envelope including required project cost information. Project cost information will be evaluated as part of the final selection criteria, after all other selection criteria is evaluated. These requirements are more fully described in later sections.
- Additional Questions to Proponents – In the event that, during the review and evaluation of the proposals, the City has additional questions, the Proponent may be contacted at the sole discretion of the City. Any contact will be made through the Department of Procurement. Any contact or communication outside the defined route may be cause for disqualification.
- Proposal Evaluations Complete – After all review and any additional questions are answered, the proposal review will be complete.
- Selected Proponents Notified of Interview – Each accepted Proponent will be advised of the schedule for interviews. It is possible for a fewer number of Proponents to be selected for interviews at the City's discretion. Those not selected for interviews will not be considered further. Each selected Proponent will be advised of the schedule for an oral interview.
- Oral Interviews – Interviews with each selected Proponent will include a demonstration of their product. Each interviewed Proponent will be provided with a selection (City selects) of process maps included in the appendices to demonstrate their product to the City of Atlanta.
- Site visits – The City will determine at its' discretion whether or not a site visit is warranted. The Proponent will be expected to identify the appropriate client site for the City of Atlanta to visit.
- Oral Interview Evaluations complete – Following the interviews, the City will complete evaluations and rank each remaining Proponent.
- Proponent Selected – The highest ranked Proponents will be notified of the City's selection. Those not selected will also be notified.
- Contract Negotiations – The City and the successful Proponent will negotiate content and cost of the contract. If a mutually agreeable contract cannot be reached within a reasonable time frame, the City reserves the right to terminate negotiations

with the first ranked Proponent and begin discussions with the second ranked Proponent.

The Request for Proposal, which includes an invitation, project description, instructions, equal business opportunity statement policy, questionnaire, and project specific questionnaire and experience record supplement, will be made available for review and purchase at **\$75.00**.

The City of Atlanta reserves the right to reject any and all Proposals and waive any technicalities, and to terminate or modify the process at any time, with or without notice, including any date or time period stated herein, and to take such other actions and exercise such other rights as shall be specified in the Request for Proposal documents. The City shall not incur any liability for any such actions.

Adam L. Smith
Chief Procurement Officer
Department of Procurement

**FC-6004007863, REQUEST FOR PROPOSAL
FOR
CUSTOMER INFORMATION SYSTEM/ BILLING SYSTEM IMPLEMENTATION AND
OFF-SITE BILLING SERVICES**

PART I

INSTRUCTIONS TO INTERESTED PROPONENTS

1.01 RECEIPT AND OPENING OF PROPOSAL PACKAGES

- A. Proposals submitted for the City CIS Project will be received as stated in the Invitation to Propose. The opening of the Proposals will be verified by the Bureau of National Standards.
- B. A "Questionnaire" for the purpose of these Instructions shall include the Questionnaire and all references and attachments thereto, the Proponents' License Certification, and any other Forms and required submittals in connection with the Request for Proposal.

1.02 EXECUTION OF QUESTIONNAIRE, SUPPLEMENTS TO QUESTIONNAIRE, AND OTHER REQUIRED SUBMITTALS

- A. Proponents shall submit their Proposals together with all Supplements and required submittals which the Proponents are required to provide, executed in the appropriate manner as set forth below:

The Proponent is required to be a Joint Venture (JV). Each party to the joint venture shall execute the form entitled "Joint Venture Affidavit" in the manner set forth below:

- 1. If any member of the JV is a corporation, all documents requiring execution by the Proponent shall be signed by the president or vice president of the corporation whose signature shall be attested by the secretary or assistant secretary of the corporation and the corporate seal affixed;
- 2. If any member of the JV is an individual, he/she shall sign the documents and his/her signature shall be notarized by a notary public.
- 3. If any member of the JV is an individual doing business under a trade name, all documents shall be signed by the

Proponent whose signature shall be followed by either, “doing business as,” or “trading as,” followed by the trade name of the Proponent’s business, and notarized by a notary public.

4. If any member of the JV is a Partnership, all forms shall be executed by placing the name of the partnership by “By: (the name of the partner executing)” followed by the word “Partner,” and notarized by a notary public.

1.03 PREPARATION OF STATEMENTS

- A. All statements shall be submitted as a set of fifteen (15), one (1) original and fourteen (14) copies and either typewritten or completed with pen and ink, signed by Proponent’s authorized representative(s). All Questionnaires must be regular in every respect and no interlineations, excisions, or special conditions shall be made or included in the Statements by Proponent.
- B. The complete Questionnaire, including all other Forms and Supplements, shall be organized in one tabbed binder as described under Part 1, Section 2.01, “Instructions,” of the Questionnaire. The binder shall be enclosed in an envelope which shall be sealed and clearly labeled with the Project name, the project FC number(s), name of Proponent, and date and time of the Opening of such Proposals, in order to guard against premature opening of the package.
- C. The City may consider as irregular any conditions attached to the Proposal, including the Questionnaire, on which there is an alteration of, or departure from, the Forms attached and tabbed binders permitted under Part 1, Section 2.01, “Instructions,” of the Questionnaire and at its option may reject the same.
- D. Erasures or other changes in the Questionnaires must be explained or noted over the signature of Proponent. Failure to do so shall render Proponent non-responsive and may cause rejection of the Questionnaire(s).
- E. Failure to execute the Questionnaires in the manner required herein shall render Proponent non-responsive and may cause rejection of the Questionnaire(s).

1.04 QUESTIONNAIRE

- A. The statement of the Proponent’s qualifications shall be filled out completely on the Questionnaire, signed by the Proponent and notarized.
- B. The City shall have the right to require such additional information as it deems necessary to evaluate the ability of Proponent to successfully perform the work.

- C. The City reserves the right to reject any Proponent who does not satisfy the City as to its ability to successfully perform the work, previous pre-qualification notwithstanding.
- D. Causes for disqualification or rejection may include but are not limited to the following:
 - 1. Lack of ability, capacity and skill of Proponent to perform the contract or to provide the services required.
 - 2. Lack of capability of Proponent to perform the contract or to provide the services promptly, or within the time specified, without delay or interference.
 - 3. Lack of character, integrity, reputation, judgment, experience and efficiency of Proponent.
 - 4. Inadequate performance of previous contracts or services by the Proponent.
 - 5. Lack of previous and existing compliance by the Proponent with laws and ordinances relating to the contract or services.
 - 6. Insufficiency of the financial resources and ability of Proponent to perform the contract and provide the services.
 - 7. Non-compliance of Proponent with the requirements of an equal employment opportunity in contracting program as may be prescribed by ordinance.
 - 8. Non-compliance by the Proponent with the requirements of a minority and female business enterprise participation program as may be prescribed.
 - 9. Inadequate quality, availability and adaptability of the supplies or services proposed by the Proponent Proposal Package to the particular use required for the Project.
 - 10. Unacceptable number and scope of conditions attached to the Proposal Package by the Proponent, if any.

1.05 SUPPLEMENTS TO QUESTIONNAIRE

- A. The Project Specific Qualification and Experience Record Forms shall be filled in completely and accurately. All contact information for project references shall be current.

1.06 EQUAL BUSINESS OPPORTUNITY (EBO), EQUAL EMPLOYMENT OPPORTUNITY PROGRAM STATEMENT OF POLICY AND FIRST SOURCE JOBS AGREEMENT STATEMENT OF POLICY

- A. The Equal Business Opportunity (EBO), Equal Employment Opportunity (EEO) and First Source Jobs Program Statement of Policy must be observed by the Proponent(s).

1.07 ADDENDA AND INTERPRETATIONS

- A. All questions by Proponent(s) as to the interpretations of the Request for Proposal and Instructions to Interested Proponents must be submitted in writing to: Chief Procurement Officer, Department of Procurement, 55 Trinity Avenue, S.W., Suite 1790, Atlanta, Georgia 30303, and must be received at least seven (7) days before the date and time set for the opening of the Questionnaires.
- B. Every interpretation made to a Proponent will be in the form of an addendum to the Request for Proposal, and when issued, will be on file in the office of the Department of Procurement.
- C. All addenda will be distributed to each person holding the Request for Proposal, but it shall be the Proponent's responsibility to make inquiry as to the addenda issued. All such addenda shall become part of the Request for Proposal Statement and all Proponents shall be bound by such addenda, whether or not received by the Proponents.
- D. The City will not be bound by any information, explanation, clarification, or any interpretation, oral or written, by whomsoever made, that is not incorporated into an addendum to the Request for Proposal. No response will be made to inquiries RECEIVED later than **seven (7) calendar days (November 24th, 2004)** before the scheduled Opening of Proposals.
- E. Any formal protest which is to be made by an aggrieved Proponent concerning the Proposal solicitation or the evaluation of Questionnaires must be submitted in writing to: Chief Procurement Officer, Department of Procurement, 55 Trinity Avenue, S.W., Suite 1790, Atlanta, Georgia 30303, with a concurrent copy to: Commissioner, Department of Watershed Management, City of Atlanta, 55 Trinity Avenue, S.W., Suite 5400, Atlanta, Georgia 30303, and must be submitted within ten (10) days after such Proponent knows or should have known of the facts giving rise thereto. The protest shall include a clear and detailed statement of the basis upon which it is filed. The failure of the Proponent to file any protest within the time limits prescribed herein shall be deemed a material prejudice to the interests of the City and shall constitute an absolute waiver of the protest and the right to thereafter prosecute same.

1.08 PRE-PROPOSAL CONFERENCE

- A. At the Pre-Proposal Conference, the general requirements of the Project will be discussed. Any additional questions raised by Proponents will be discussed.
- B. Also discussed will be questions regarding the preparation and submission of Questionnaires and general requirements for the Project.
- C. It should be emphasized, however, that nothing stated or discussed during the course of this Pre-Proposal Conference shall be considered to modify, alter or change the requirements of the Request for Proposal, unless it shall be subsequently incorporated into an addendum to the Request for Proposal.

1.09 TIME FOR RECEIVING PROPOSALS

- A. Proposals received prior to the advertised hour of opening (1:59 p.m. EST) will be kept secured and sealed. The officer whose duty it is to open them will decide when the specified time has arrived, and no Proposal received thereafter will be considered by the City.

1.10 MODIFICATION AND WITHDRAWAL OF PROPOSALS

- A. Proposals may be modified after they have been submitted, but only before the deadline established for receipt of Proposals. Modifications must be signed by the Proponent(s) and must be received by the City no later than the deadline.
- B. Proposals may be withdrawn after they have been submitted, but only before the deadline established for receipt of Proposals. Withdrawn Proposals may be resubmitted, but only in the manner in which the Proposal was originally submitted. Withdrawals must be signed by the Proponent(s) and must be received by the City no later than the deadline.

1.11 EVALUATION OF PROPONENTS' RESPONSES AND PROPOSALS

- A. After the Proposals have been opened, the City will evaluate the Proponents' responses, including the Questionnaire and all Supplements to the Questionnaire and required submittals, financial data, Proponents' references, Proponents' experience and other data relating to the Proponents' responsibility and Qualification to perform the Project satisfactorily. Proponents may be required to submit additional or supplemental information to the City, if necessary, for the City to determine whether the Proponent(s) meet all of the standards outlined.

- B. Proponents may be required to submit, in writing, the names, addresses and telephone numbers of any proposed subcontractors or equipment manufacturers, and to submit other material information relative to proposed subcontractors or equipment manufacturers, to be used if Proponents are qualified to submit proposals for the Project. The City reserves the right to disapprove any proposed subcontractor or equipment manufacturer whose technical or financial ability or resources or whose experience are deemed inadequate.
- C. The City reserves the right to cancel the Request for Proposal or to reject any or all responses to the Request for Proposal, or parts thereof, if it determines, in its sole discretion, that such cancellation or rejection is in the best interest of the City.
- D. Responses to the Statement will be evaluated. The City will determine which Proponents are responsive to the material terms and conditions of the Invitation to Interested Proponents and the Request for Proposal. The City will then determine who is technically, financially and otherwise responsible to perform the Project satisfactorily and who has the capacity to meet all other requirements of the proposed Project. Any response may be rejected if it is determined by the City to be non-responsive, provided, however, that the City reserves the right to waive any irregularities or technicalities which it determines, within its sole discretion, to be minor in nature and in the best interest of the public. Furthermore, any response may be rejected if it is determined by the City, in its sole discretion, that the Proponent is not capable of performing the proposed Project satisfactorily based upon review of its experience and technical and financial capabilities or the failure of such to provide information requested relating to such determination. Additionally, the City reserves the right to disqualify Proponents, before and after the Opening of Proposals, upon evidence of collusion with intent to defraud or other illegal practices upon the part of any Proponent(s).

1.12 INSURANCE REQUIREMENTS

- A. Proponent(s) shall submit evidence of its insurability and bonding capacity for the performance of the Project as identified more fully in the Questionnaire.

1.13 PROPOSAL CONTENTS

All Proponents shall submit an original and fourteen (14) copies of each part of their proposal. Proposals shall be submitted by the time and date indicated on the notice provided. PROPOSALS NOT SUBMITTED BY THAT TIME WILL BE

REFUSED. Acceptance of a proposal from a Proponent does not automatically result in an interview. The time that is indicated on the date stamped in the Procurement Department is considered the official time. The Technical Aspects of proposals (Part I) are to be submitted in separate sealed envelopes labeled:

Envelope #1

**TECHNICAL PROPOSAL FOR CUSTOMER INFORMATION SYSTEM/
BILLING SYSTEM IMPLEMENTATION AND OFF-SITE BILLING
SERVICES FC-6004007863 PART 1**

Envelope #2

**PROJECT COST PROPOSAL FOR CUSTOMER INFORMATION
SYSTEM/ BILLING SYSTEM IMPLEMENTATION AND OFF-SITE
BILLING SERVICES FC-6004007863 PART 2**

Proposals may be submitted in person or by mail to the following address:

Department of Procurement
55 Trinity Avenue, S.W.
City Hall South
Suite 1790
Atlanta, Georgia 30303

NOTE: Proposal costs should include hardware, software, licensing, maintenance agreement, and consulting costs (see Part Two – Project Costs).

**TECHNICAL PROPOSAL FOR
CUSTOMER INFORMATION SYSTEM/ BILLING SYSTEM
IMPLEMENTATION AND OFF-SITE BILLING SERVICES
FC-6004007863 PART 1**

NOTE: Upon submission, all proposals become the property of the City of Atlanta, Georgia and are subject to public record laws.

Part One - Technical Aspects

The following information shall be provided in the order detailed:

- a. Title Page - List the RFP subject, the name of the Proponent, managing office address, telephone number, name of contact person and date.
- b. Table of Contents - Include a clear identification of the material included in the proposal by page number.
- c. Letter of Interest - Limit response to two (2) pages. Make a positive commitment to perform the required work within the time period requested. Identify the Particular service (Customer Information System) being proposed upon by the Proponent. Also, give the name(s) of the person(s) who will be authorized to make representation for your organization, their title, and telephone number.
- d. Management Section - Limit response to two (2) pages. State specific committed project team, timing of availability, percent dedication to the project, on-site personnel, and any other pertinent data, relative to the unique capabilities of the Proponent to meet the City's needs. Define abilities for schedule and cost tracking and control, define the process for Billing Service Selection, and define the process for outside services selection.
- e. Project Implementation Methodology - Provide a description of the Proponent's approach and understanding of the work required, specific to City. Include the Proponent's comprehensive plan to provide a smooth transition for the current City's staff to implement the new system. Describe the process by which the Proponent would train and transition from the existing system to the new system. The content of the Project Implementation Methodology section must address:
 - Task definition and specific deliverables
 - Quality assurance approach
 - Staff training and integration
 - Outline of the Implementation Plan

- f. Technical Section. Define in detail how the new system will meet the City's needs, technically, with or without software patches, modifications, and outside third party software.
- g. Optional Services - The Proponent shall provide information on their ability and experience and approach to provide any optional services.
- h. Additional Data - Limit response to two (2) pages. Include in this section any information deemed to be pertinent but not covered in any of the previous sections. If there is no additional information to present, please indicate.

Part Two – Project Costs

The following information shall be provided in a separate sealed envelope for the City's evaluation after the technical capabilities of the Proponent are verified:

- a. Software cost;
- b. Hardware cost;
- c. Data conversion cost;
- d. User group and technician training;
- e. CIS Implementation Services;
- f. CRM Implementation Services
- g. Consulting services;
- h. Modification costs;
- i. All software licensing cost (detail the license cost structure e.g. per user, per site, etc.);
- j. Future software maintenance fees; and
- k. Any additional fees necessary for the CIS implementation that are not listed above. Please detail these costs including any startup costs and/or reoccurring fees.

Each area shall be broken down sufficiently for the City to clearly understand the basis of the Proponent's labor costs by task, outside costs, on-site costs and service fees.

1.14 SELECTION CRITERIA:

Proponent software offerings will be evaluated in seven key areas based on proposals submitted in response to this RFP. The seven key areas are the following:

1. **Functional Fit.** Proponent software offerings will be evaluated based on responses made to the business requirements criteria. Functional fit will be assessed on an application function level.
2. **Technology.** Proponent software architecture will be evaluated based on responses made to the technical requirements.
3. **Proponent Stability and Support.** The Proponents' financial strength will be evaluated based on your financial reports submitted for review. An assessment of Proponent support will be made of the quality and availability of implementation methodology, post-sales support and client training.
4. **References.** Proponent references will be carefully checked. The results of these reference checks will play a major role in the evaluation of the Proponent.
5. **Demonstrations.** Proponents will be required to demonstrate their system's ability to perform the functions listed in this document and answer questions from the City staff and its Consultant.
6. **Site Visits.** Proponents may be required to coordinate a site visit to allow the City and its Consultant to talk with the Proponent's customer regarding the system.
7. **Project Costs.** Several areas of project cost will be evaluated. Areas assessed will include initial costs for software, hardware, user and technical training, implementation services, consulting services and modifications. Future costs for software maintenance fees will also be evaluated.

1.15 PROPONENT DEMONSTRATIONS:

Following the RFP submittals and review and based on the evaluation of RFP responses, select Proponents will be named as finalists. Each selected finalist will be required to perform a demonstration of their CIS package at the City as part of the interview process. At the time of notice of the interview, the City will provide further details regarding the demonstration expectations, including, but not limited to: workflow examples, business process scenarios and output production. It will be the Proponent's responsibility to gather relevant information sufficient to perform this type of demonstration. The business process selected for the Proponent to demonstrate will be selected from the business mapping provided in the appendix of these documents.

1.16 INTERVIEW CONTENT

Following RFP review, a short list of interview Proponents will be prepared. Each selected Proponent to be interviewed will be notified of interview date, time and duration. Content will not be specifically limited, but shall include a minimum of the following:

- Oral Presentation of Project Approach
- Task Definition and Deliverables
- Quality Assurance Approach
- Staff Training and Integration
- Staffing Requirements; Number, Time Commitment
- Implementation Plan
- System Demonstration Specific to one of the City Business Processes